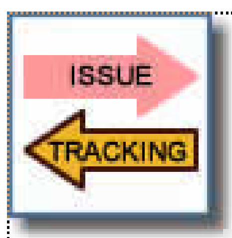
Kansas Department for Aging and Disability Services

Issue Tracking Instructions (State Agencies)



Issue Tracking
MCO/Agency

January 24, 2014

Table of Contents

General Instructions

Overview

The Issue Tracking Application is a KDADS web application.

System Requirements and Browser Settings

- **Firewall Settings** may need added.
  - To check if you will be able to access the KDADS Web Application site, follow the steps on pages 3-4. If the sign in page does not display, our site will need to be added to your firewall. Please contact the KDADS Help Desk for the specific address/port to be added to the firewall.
- Internet Connection
- Internet Browser:
  - Microsoft Internet Explorer 6.0 or newer - Recommended
  - Firefox – current version
- Disable all Pop-Up blockers

Contact Persons

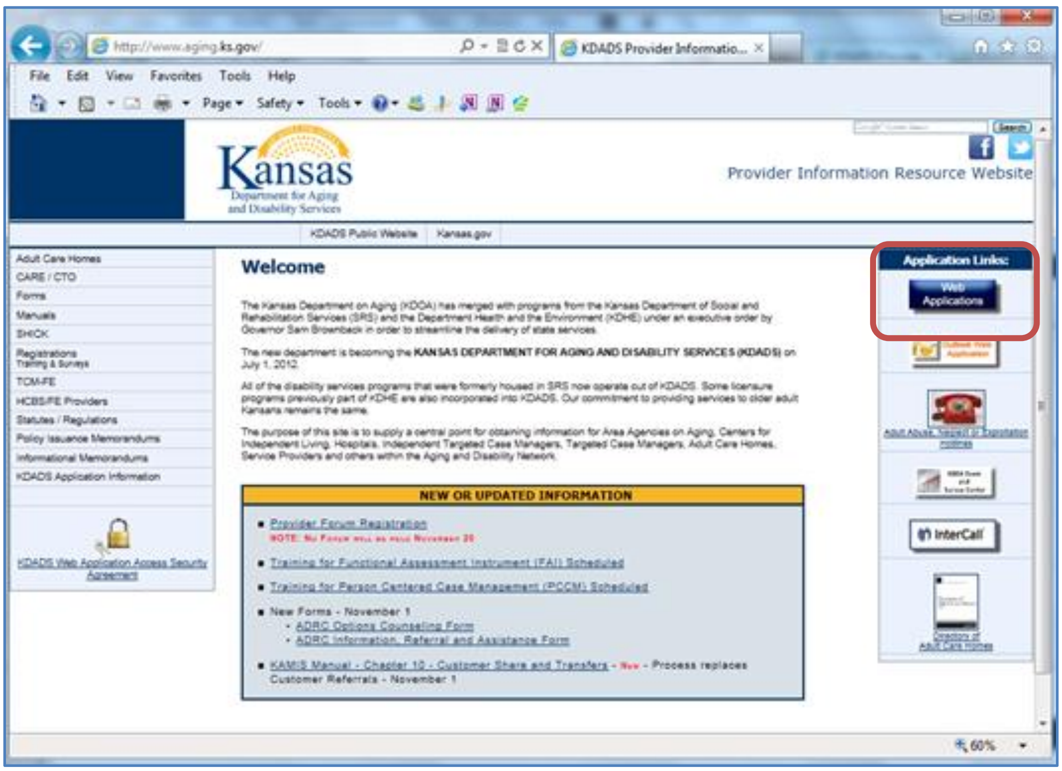
Issue	Contact Person
Application How To Questions Password Change	KDADS Help Desk ***Phone:*** *(785) 296-4987* *or* *(800) 432-3535* ***E-Mail:*** *HelpDesk@kdads.ks.gov*
Questions about the Issue Tracking Policies and Guidelines.	***Phone:*** *(800) 432-3535*

Accessing the Application

Introduction Use Microsoft Internet Explorer or FireFox browser to access the KDADS web application site. All KDADS Web Applications are secured and encrypted.

How To Follow the steps in the table below to accessing the login page for the KDADS Web Application.

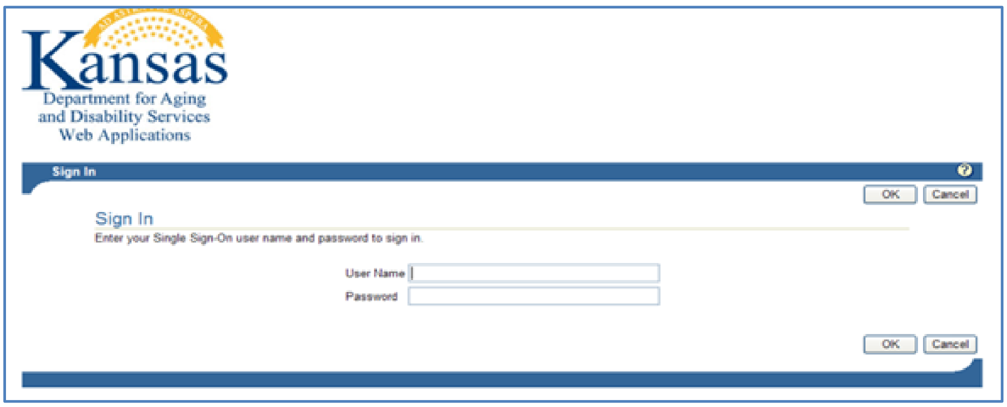
Step	Action	Result
1.	Open the internet browser. Access the KDADS Provider Information Resource Web Site. www.aging.ks.gov	The KDADS Provider Web Site Home Page will be displayed.



2.	Select the **Web Applications** link under the "Applications Link".	The KDADS Web Application Login page will display.

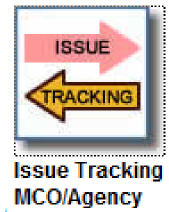
Logging-In

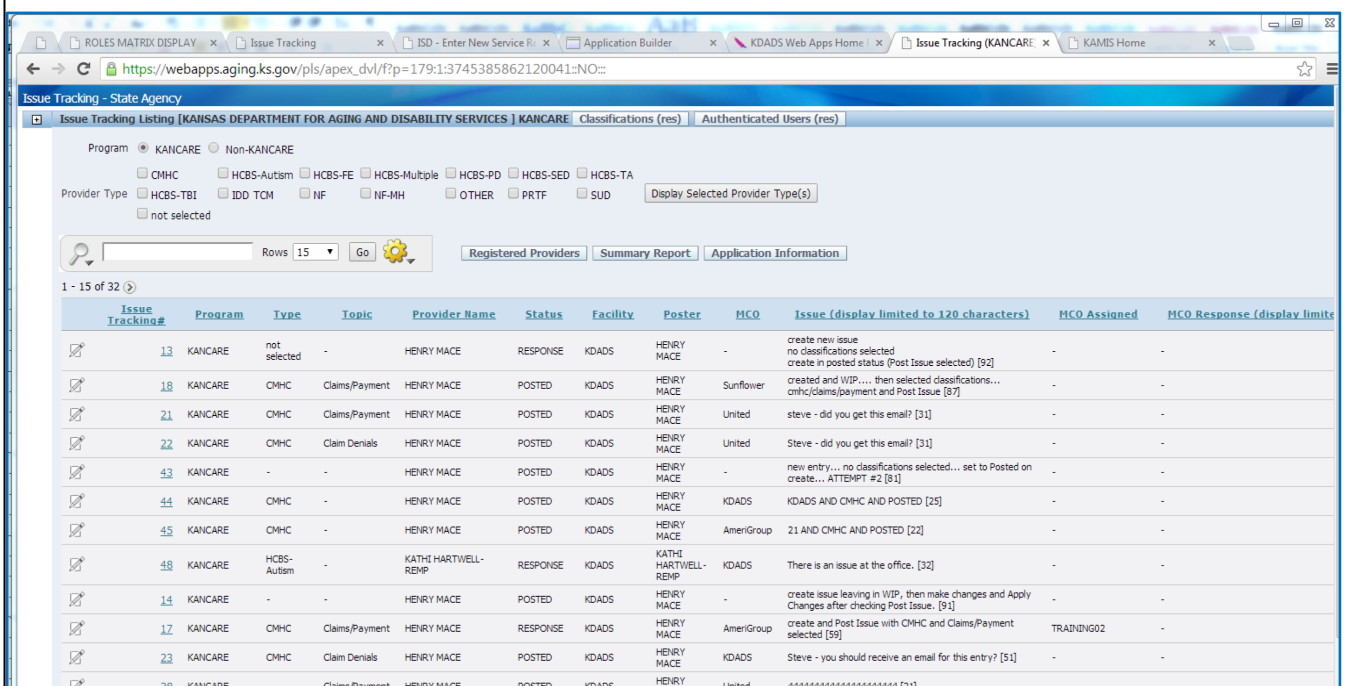
How To Follow the steps in the table below to complete the Login process.

Step	Action	Result
1.	Once the Login page is displayed. Type the **User Name**. Press **Tab**.	Insertion point advances.
		
2.	Enter **Password**. If it is the first time signing into the application, use the initial password that was issued in the e-mail from the KDADS Information Services Division. Click the **OK** button.	The Web Application Home page will display.

Accessing the Issue Tracking Application

How To Follow the steps in the table below to access the Issue Tracking application.

Step	Action	Result
1.	To access the Issue Tracking Application, click on the **Issue Tracking** button on the Web Applications Home Page.	
2.	Opens to the **Listing** page of the Issue Tracking Application.	



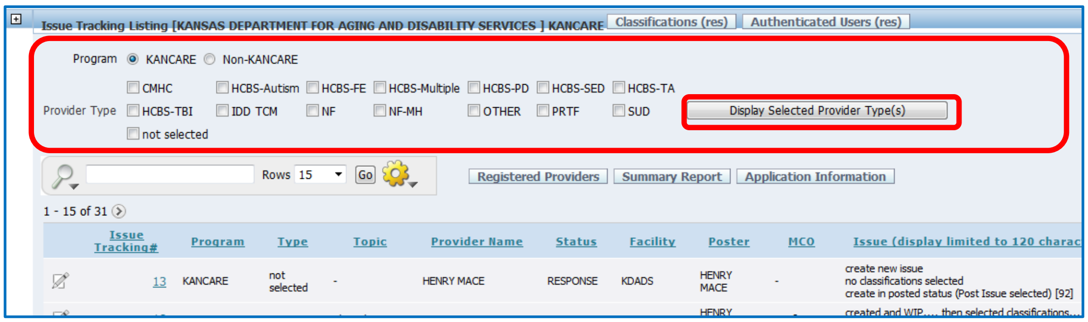
Navigation – Issue Tracking Listing

Introduction

The report displays the issues that have been entered in the Issue Tracking System. The listing is an Interactive Reports, which gives the user a table view then allows the user to utilize filters and other reporting tools to create custom views of the data.

Select the appropriate criteria and click on the **Display Selected Provider Type(s)** button.

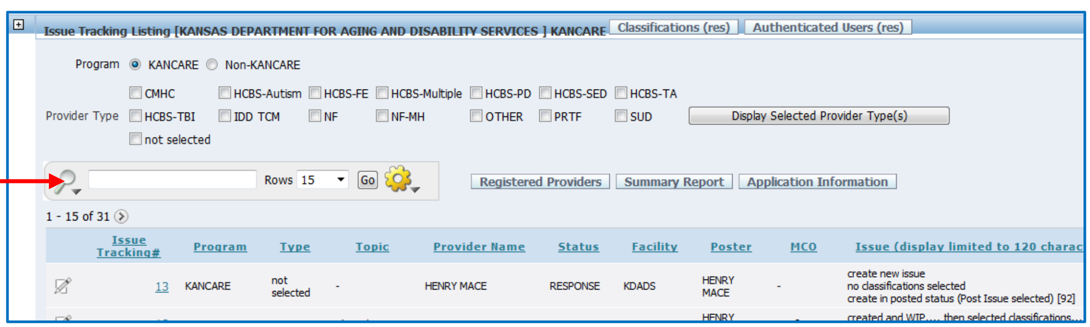
Filters



A report based on the filters selected will display.

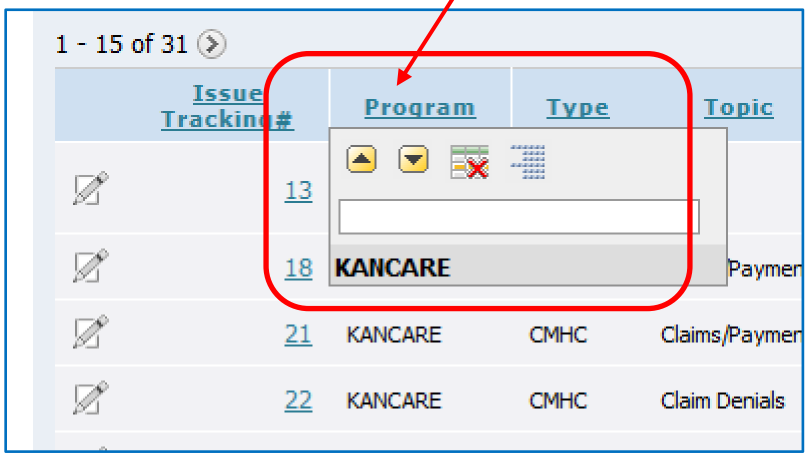
The report is interactive with a search field. Enter the criteria and click on the "Go" Button. Additional sorting and filtering options as well as a download utility can be found under the "Gear" icon. Detail instructions regarding additional features of the interactive report are located in this document on page 11.

Search Field



Navigation – Issue Tracking Listing

The report is also interactive by utilizing the column headings to sort or filter by the content.

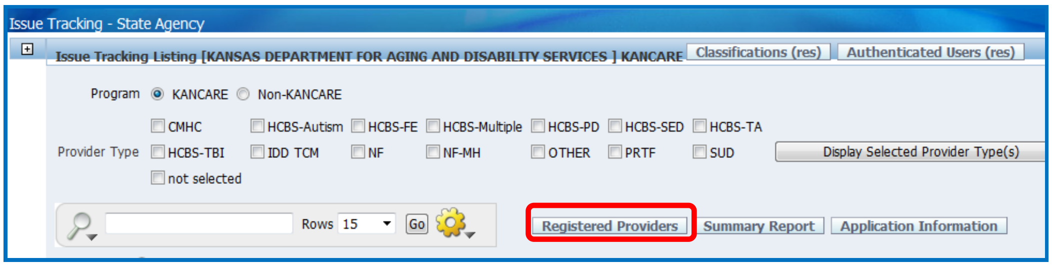


Navigation – Registered Providers

Introduction

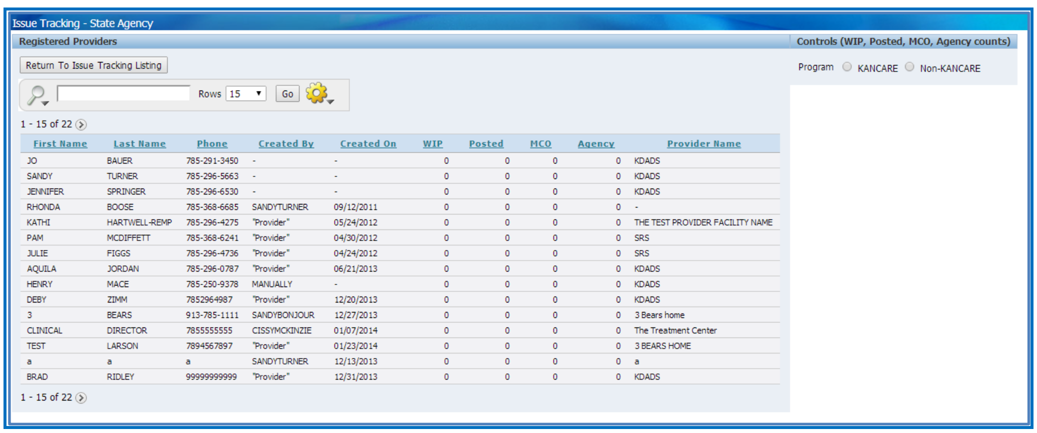
The **Registered Providers** button will display a list of providers and an overview of the number of issues they have posted.

Registered Providers:



Registered Providers

A list of registered providers will display.



First Name	Last Name	Phone	Created By	Created On	WIP	Posted	MCO	Agency	Provider Name
JO	BAUER	785-291-3450	-	-	0	0	0	0	KDADS
SANDY	TURNER	785-296-5663	-	-	0	0	0	0	KDADS
JENNIFER	SPRINGER	785-296-6530	-	-	0	0	0	0	KDADS
RHONDA	BOOSE	785-368-6685	SANDYTURNER	09/12/2011	0	0	0	0	-
KATHI	HARTWELL-REMP	785-296-4275	"Provider"	05/24/2012	0	0	0	0	THE TEST PROVIDER FACILITY NAME
PAM	MCDIFFETT	785-368-6241	"Provider"	04/30/2012	0	0	0	0	SRS
JULIE	FIGGS	785-296-4736	"Provider"	04/24/2012	0	0	0	0	SRS
AQUILA	JORDAN	785-296-0787	"Provider"	06/21/2013	0	0	0	0	KDADS
HENRY	MACE	785-250-9378	MANUALLY	-	0	0	0	0	KDADS
DEBY	ZIMM	7852964987	"Provider"	12/20/2013	0	0	0	0	KDADS
3	BEARS	913-785-1111	SANDYBONJOUR	12/27/2013	0	0	0	0	3 Bears home
CLINICAL	DIRECTOR	7855555555	CISSYMCKINZIE	01/07/2014	0	0	0	0	The Treatment Center
TEST	LARSON	7894567897	"Provider"	01/23/2014	0	0	0	0	3 BEARS HOME
a	a	a	SANDYTURNER	12/13/2013	0	0	0	0	a
BRAD	RIDLEY	99999999999	"Provider"	12/31/2013	0	0	0	0	KDADS

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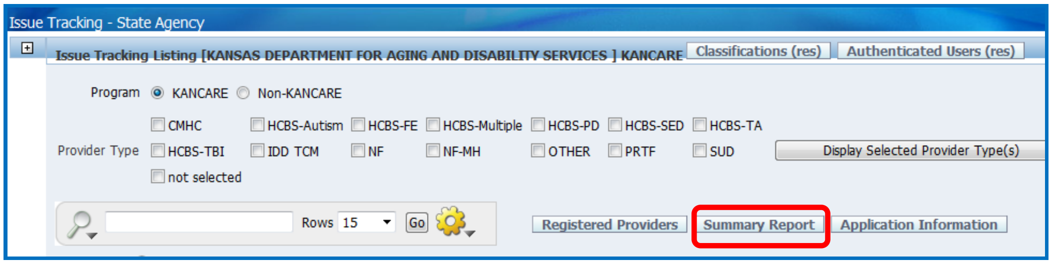
Select the **Return to Issue Tracking Listing** to return to the issue list.

Navigation – Summary Report

Introduction

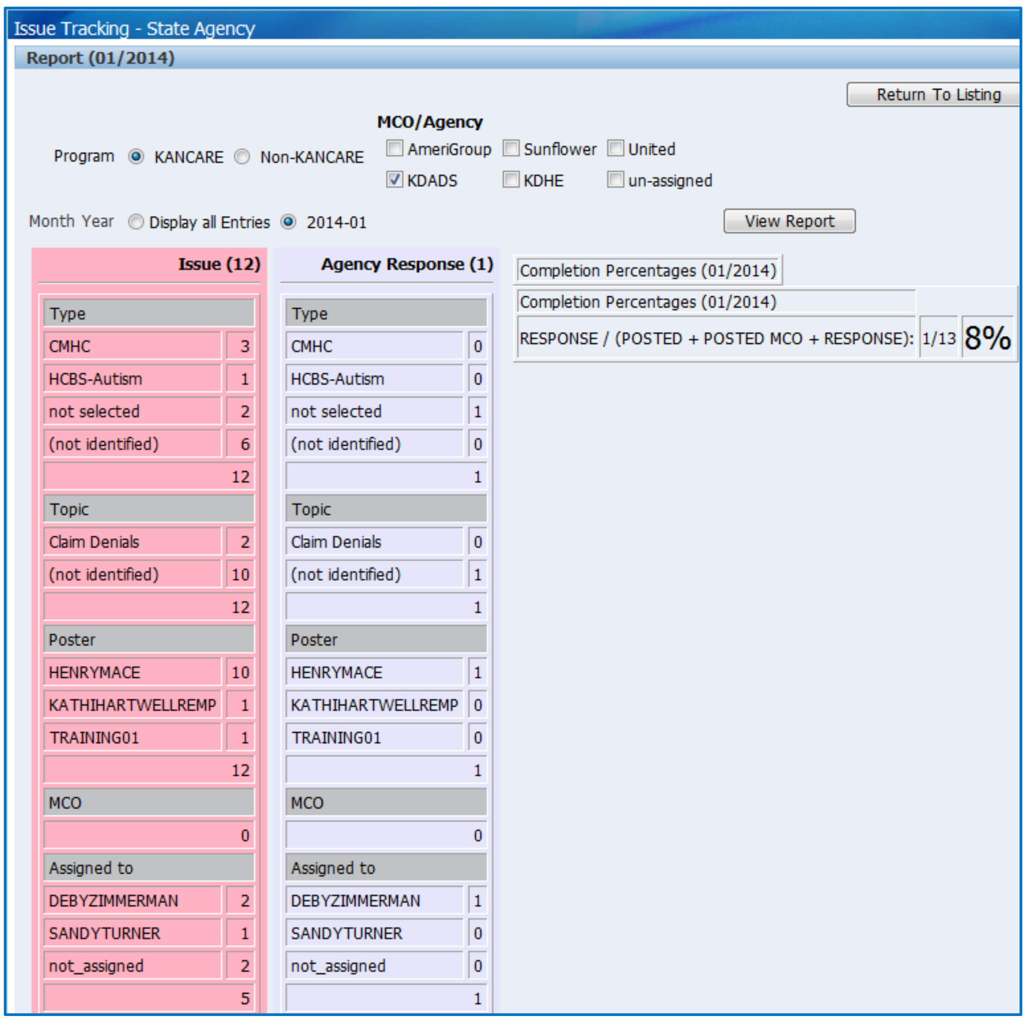
The **Summary Report** button will display an overview of the number of issues logged and the agency responses entered.

Summary Report



Select the **Summary Report** button.

Summary Report



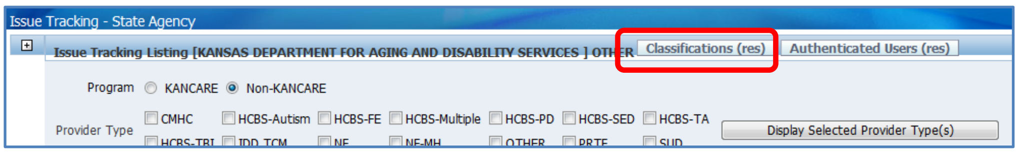
The Summary report will display.

Select the **Return to Listing** to return to the issue list.

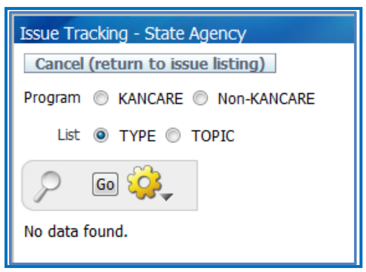
Navigation – Classifications (res)

Introduction

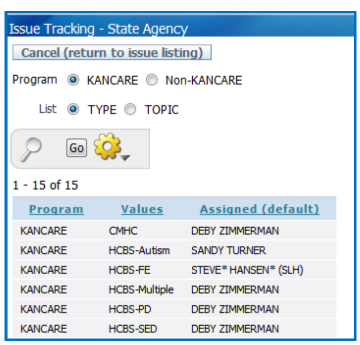
The **Classification (res)** button will display the individual assigned to the program.



Classifications (res)



Select the Program.

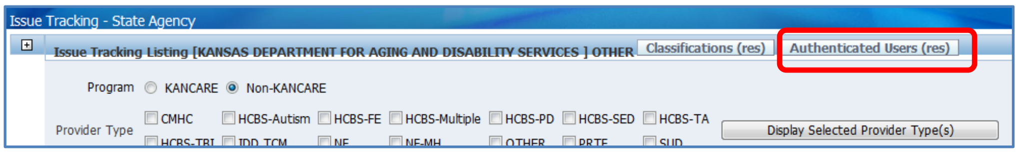


Select the **Return to Issue Tracking Listing** to return to the issue list.

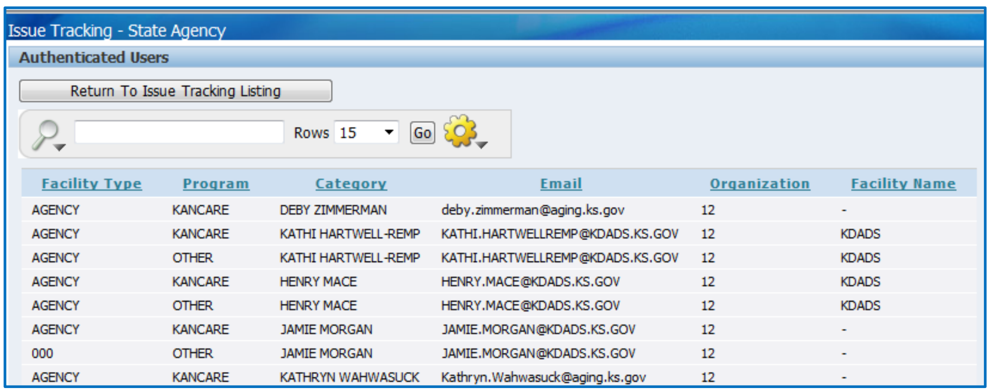
Navigation – Authenticated Users (res)

Introduction

The **Authenticated (res)** button will display a list of authenticated users.



Authenticated Users (res)



Facility Type	Program	Category	Email	Organization	Facility Name
AGENCY	KANCARE	DEBY ZIMMERMAN	deby.zimmerman@aging.ks.gov	12	-
AGENCY	KANCARE	KATHI HARTWELL-REMP	KATHI.HARTWELLREMP@KDADS.KS.GOV	12	KDADS
AGENCY	OTHER	KATHI HARTWELL-REMP	KATHI.HARTWELLREMP@KDADS.KS.GOV	12	KDADS
AGENCY	KANCARE	HENRY MACE	HENRY.MACE@KDADS.KS.GOV	12	KDADS
AGENCY	OTHER	HENRY MACE	HENRY.MACE@KDADS.KS.GOV	12	KDADS
AGENCY	KANCARE	JAMIE MORGAN	JAMIE.MORGAN@KDADS.KS.GOV	12	-
000	OTHER	JAMIE MORGAN	JAMIE.MORGAN@KDADS.KS.GOV	12	-
AGENCY	KANCARE	KATHRYN WAHWASUCK	Kathryn.Wahwasuck@aging.ks.gov	12	-

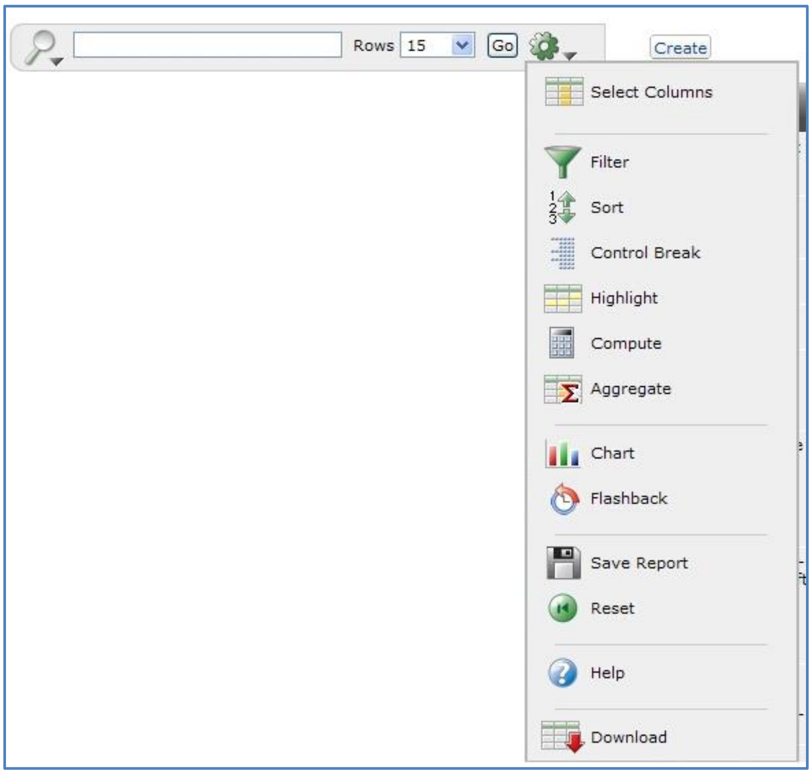
Select the **Return to Issue Tracking Listing** to return to the issue list.

Issue Tracking Listing – Interactive Report Functions

Features Below are the more commonly used reporting tools features offered by interactive reports.

How to

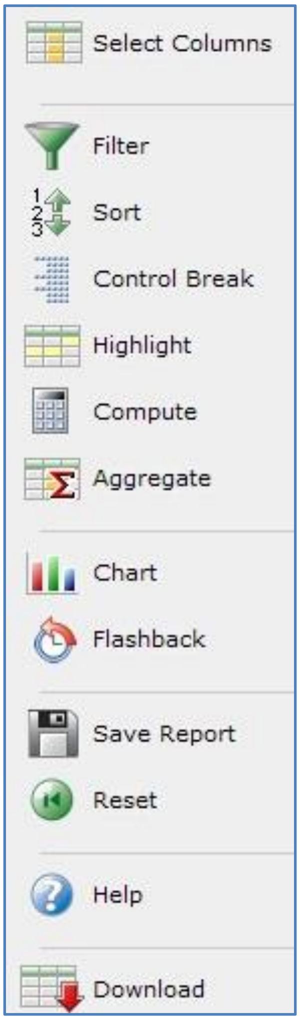
1. Open the Web Application at the Interactive Report view.
2. Click on the gear icon.
3. Report Control List will display.



Functions Covered This instruction guide will cover only the most commonly used report functions. Those functions are Filter, Sort, Control Break, Highlight, Save Report, Reset, and Download.

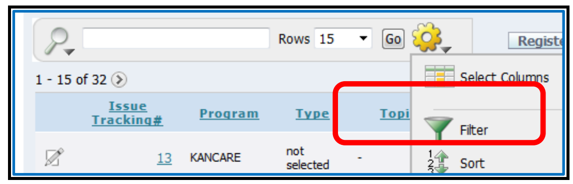
Issue Tracking Listing – Descriptions

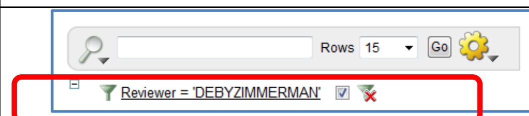
Functions Below is the descriptions of the functions available in an interactive report.

<table>
<tr><th>Reporting Control List</th><th>Action</th></tr>
<tr><td rowspan="13">
</td><td>Select Columns – Used to modify the columns displayed. The columns on the right are displayed. The columns on the left are hidden. You can reorder the displayed columns using the arrows on the far right. Computed columns are prefixed with **.</td></tr>
<tr><td>Filter – Used to filter data for a more detailed view of information.</td></tr>
<tr><td>Sort – Used to change the column(s) to sort on and whether to sort ascending or descending. You can also specify how to handle nulls (use the default setting, always display them last or always display them first). The resulting sorting is displayed to the right of column headings in the report.</td></tr>
<tr><td>Control Break – Used to create a break group on one or several columns. This pulls the columns out of the Interactive Report and displays them as a master record.</td></tr>
<tr><td>Highlight – Highlighting allows you to define a filter. The rows that meet the filter are highlighted using the characteristics associated with the filter.</td></tr>
<tr><td>Compute – Computations allow you to add computed columns to your report. These can be mathematical.</td></tr>
<tr><td>Aggregate – Aggregates are mathematical computations performed against a column. Aggregates are displayed after each control break and at the end of the report within the column they are defined. Only numeric columns will be displayed.</td></tr>
<tr><td>Chart – You can include one chart per Interactive Report. Depending upon the data in the report, the chart function may not be useful.</td></tr>
<tr><td>Flashback – Not available.</td></tr>
<tr><td>Save Report – Saves the customized report for future use. You provide a name and an optional description. A tab will be displayed for each report saved.</td></tr>
<tr><td>Reset – Restores report to the default settings.</td></tr>
<tr><td>Help – On-line Help on report functions.</td></tr>
<tr><td>Download – Allows the current report to be downloaded. The download formats is CSV which can be opened through Excel.</td></tr>
</table>

Issue Tracking Listing – Filter

How To Follow the steps in the table below to filter a Report.

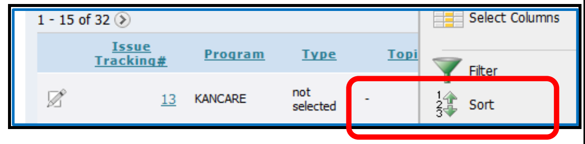
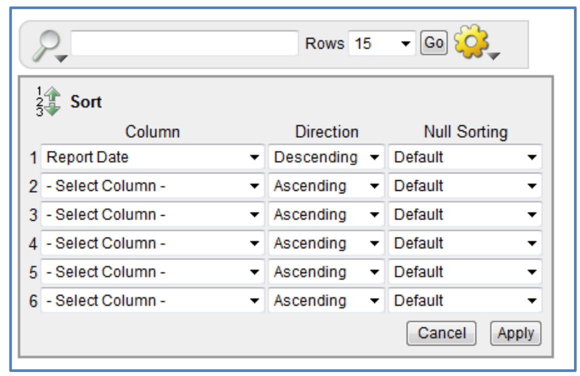
<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1.</td><td>Select Filter from the Control list.</td><td>
</td></tr>
<tr><td>2.</td><td>Select the Column to filter
Select the Operator</td><td></td></tr>
<tr><td>3.</td><td>Select the Expression.
• By clicking on the drop down arrow at the end of the express field, options will appear if appropriate.</td><td></td></tr>
<tr><td>4.</td><td>Click on the "Go" button. Report will display.

The filter criteria will display at the top of the report.</td><td>

Check Box = Enable or Disable the filter
Filter = Removes the filter</td></tr>
</table>

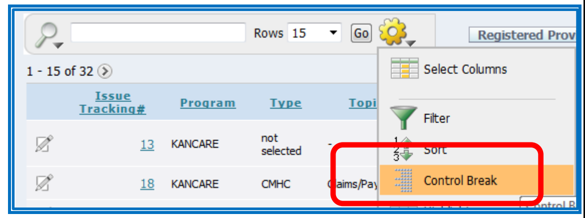
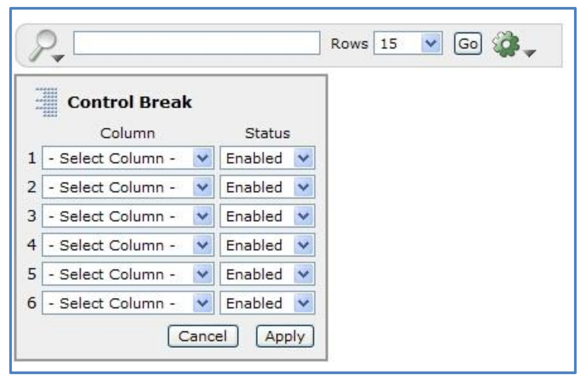
Issue Tracking Listing – Sorting

How To Follow the steps in the table below to sort a Report.

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1.</td><td>Select Sort from the Control list.</td><td>
</td></tr>
<tr><td>2.</td><td>Select the Column(s) to be sorted.
Select the Direction (Ascending or Descending)
Select how the Blank Fields (nulls) should be displayed.</td><td>
</td></tr>
<tr><td>3.</td><td>Click on Apply. Report will display.</td><td></td></tr>
</table>

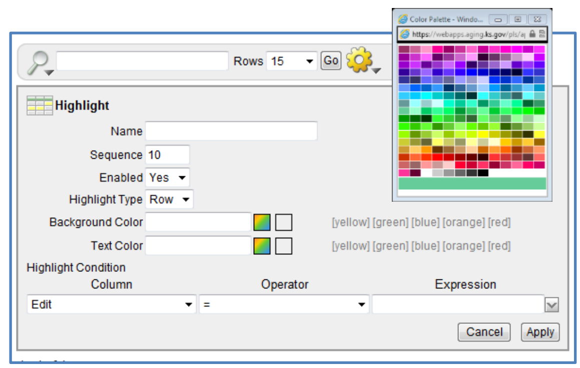
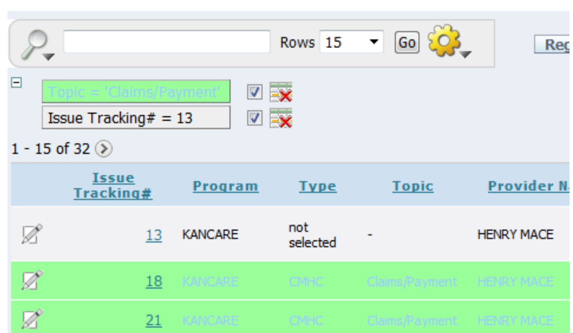
Issue Tracking Listing – Control Break on Information

How To Follow the steps in the table below to create breaks on the data information.

Step	Action	
1.	Select **Control Break** from the Control list.	
2.	Select the **Column**(s) the data will break on. Select if the **Break Status** is enable or disenabled.	
3.	Click on **Apply**. Report will display. The column selected in Step 2 will become headers.	

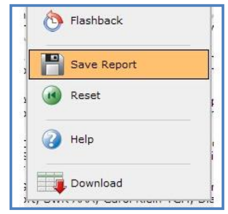
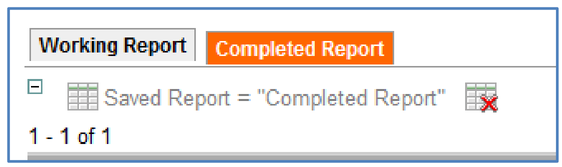
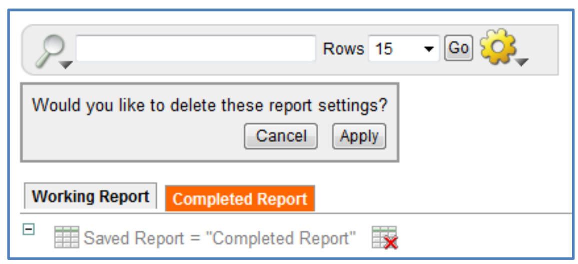
Issue Tracking Listing – Highlight Information

How To Follow the steps in the table below to apply highlights to the Report.

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1.</td><td>Select Highlight from the Control list.</td><td>
</td></tr>
<tr><td>2.</td><td>Select the criteria for the highlight display.
Name
Enabled
Highlight type
Background Color
Text Color
Column
Operator
Expression</td><td>
</td></tr>
<tr><td>3.</td><td>Click on Apply. Report will display.</td><td>
</td></tr>
</table>

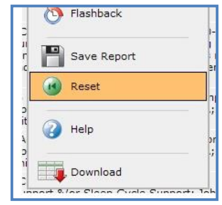
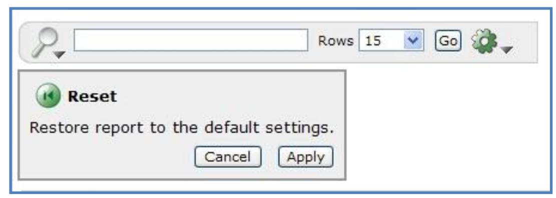
Issue Tracking Listing – Saving

How To Follow the steps in the table below to save a specialized Report.

Step	Action	
1.	Select **Save Report** from the Control list.	
2.	Enter the **Name** of the Report to be saved. This will become the Report Tab's name.	
3.	Click on **Apply**. Report will display on a separate tab.	
4.	If the report is no longer needed, it may be deleted. 1. Click on the **delete** icon (icon with red X) 2. Dialog box will display **confirming** deletion of the report. 3. Click on **Apply**.	

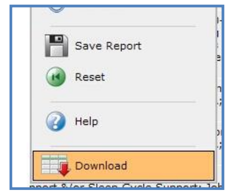
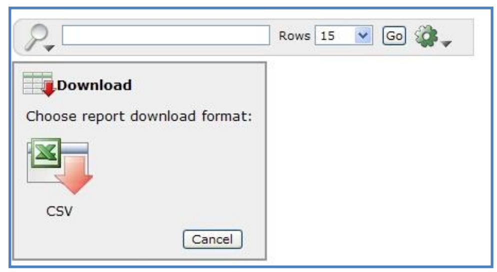
Issue Tracking Listing – Reset Report

How To Follow the steps in the table below to reset the Report back to default.

Step	Action	
1.	Select **Reset** from the Control list.	
2.	Click on **Apply** to reset the report.	

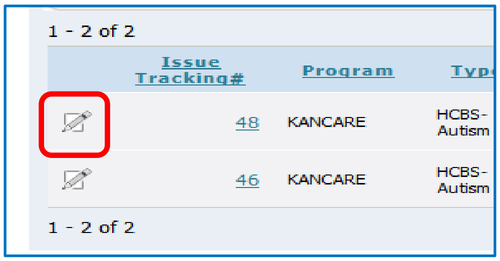
Issue Tracking Listing – Downloading Data

How To Follow the steps in the table below to download the report data.

Step	Action	
1.	Select **Download** from the Control list.	
2.	Click on the **CSV** Icon. The only option in the download format is CSV.	
3.	File download dialog box will display. Select **Save**.	
4.	Save As dialog box will display. Select the **location** (Save in) and the **File name**.	
5.	Browse to the File Location and **Open** file in Excel.	

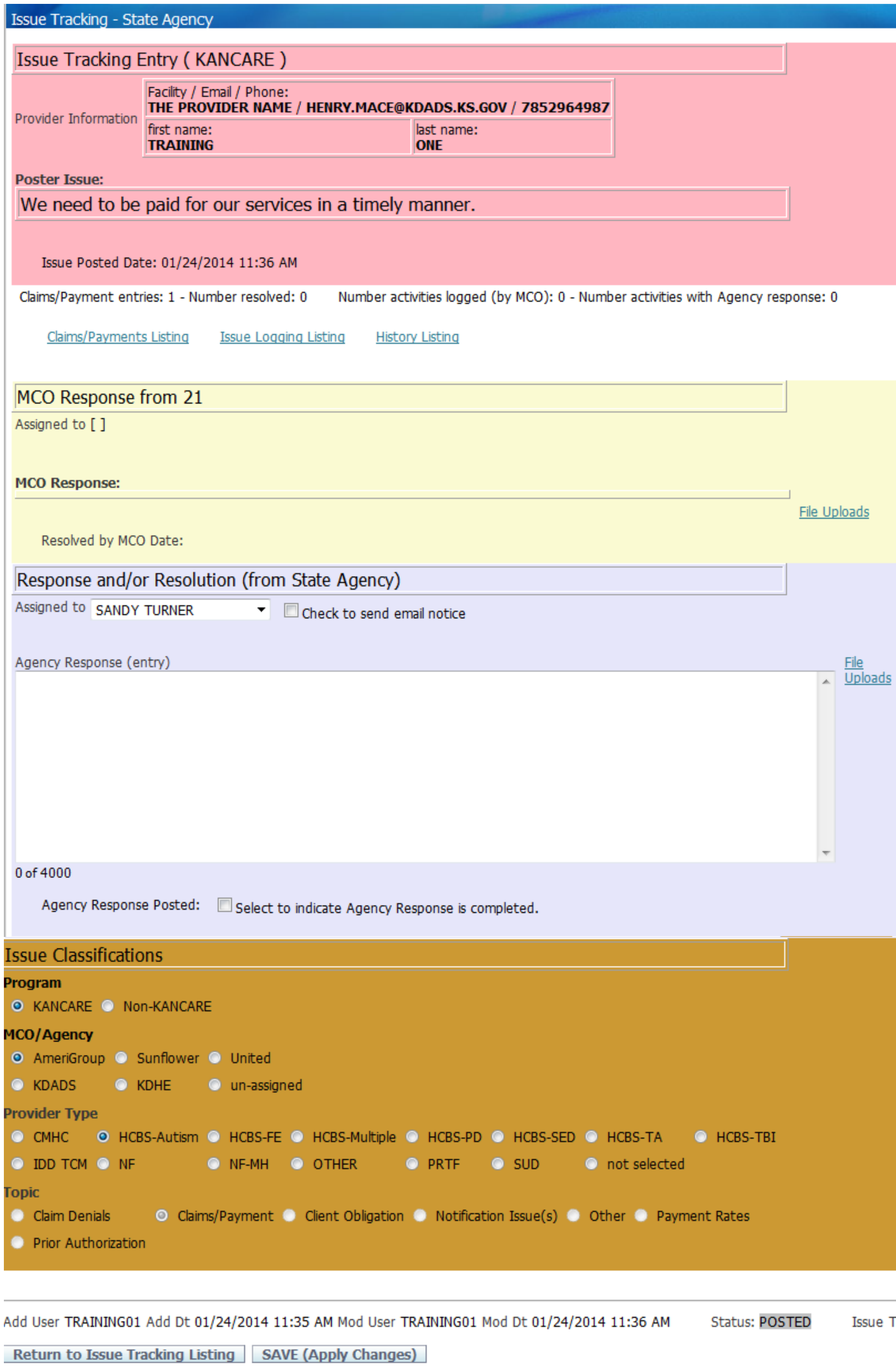
Issue Tracking Entry Detail

How To Follow the steps in the table below to access the report detail.

Step	Action	Result
1.	Under the Edit Column, **click** on the paper icon. 	The detail page will display.

Issue Tracking Report Details

Introduction Clicking on the edit icon (paper) on the Issue Tracking Listing will display the issue details.

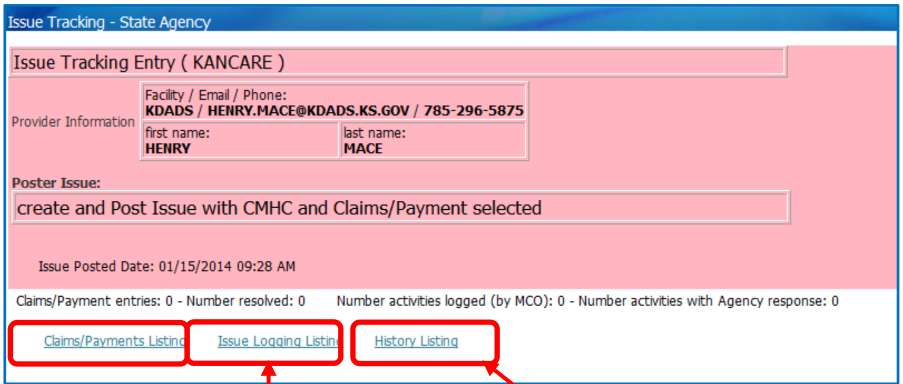


Continued on next page

Issue Tracking Report Details (Continued)

The links displayed will be determined by the type of issue.

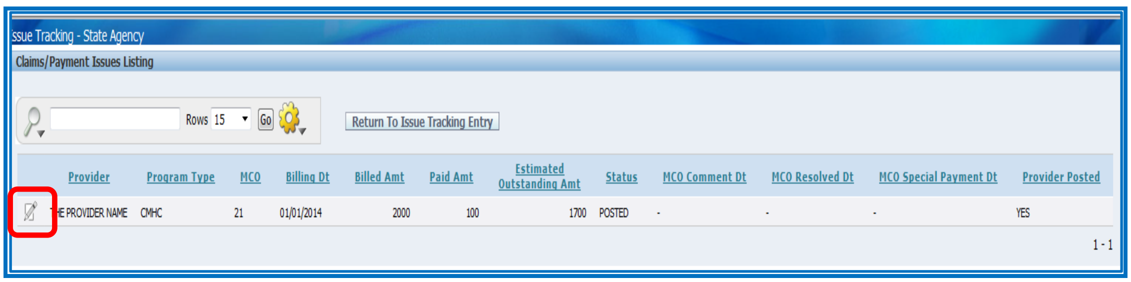
Claims Payment Listing



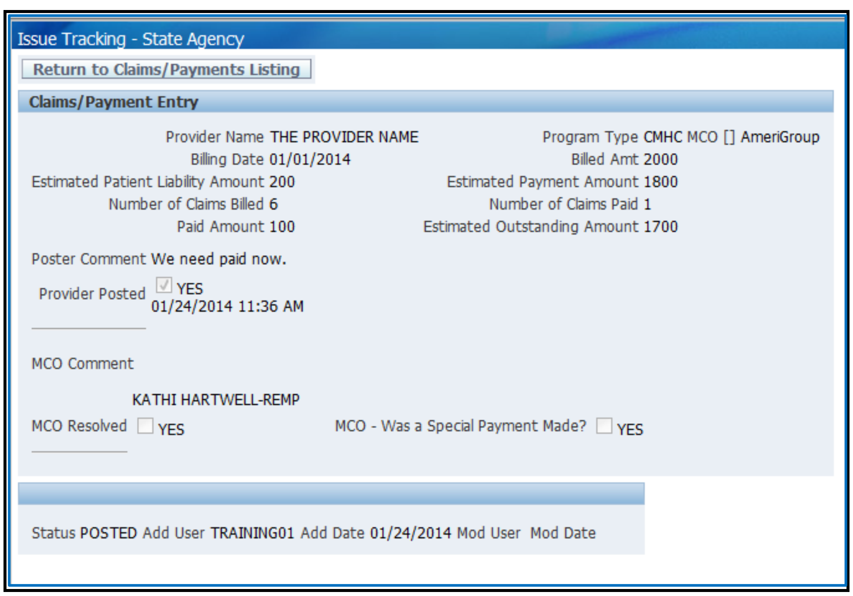
Issue Logging History **History Listing**

Claims Payment Listing

Click on the **Claims/Payment Listing** link to view the Claims Payment Issues Listing.



Clicking on the edit icon (paper) on the Claims/Payment Issues Listing will display the Claims Payment Entry.



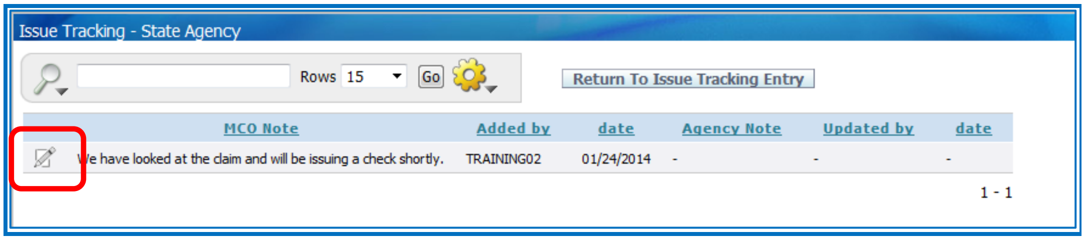
Continued on next page

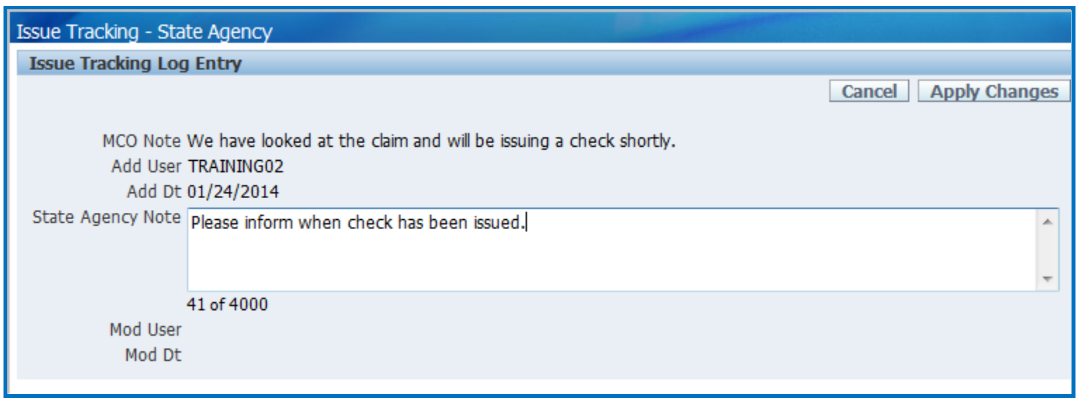
Issue Tracking Report Details (Continued)

Issue Logging History

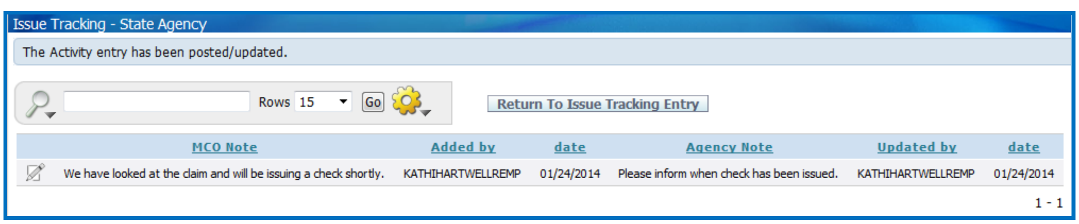
Click on the **Issue Logging Listing** link to view the logging list.

Clicking on the edit icon (paper) on the Issue Logging Listing will display the Issue Tracking Log Entry.





Agency staff may enter a response in the State Agency Note field. Click on the **Apply Changes** button to save the response.



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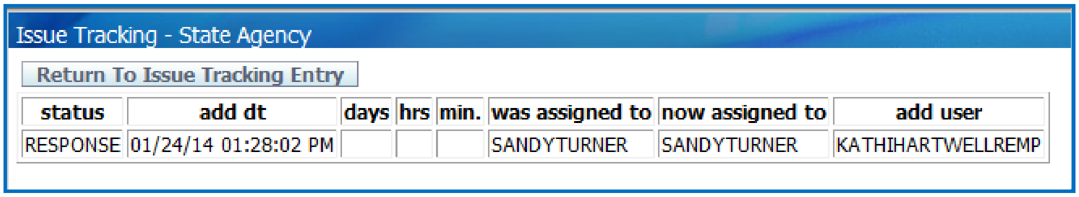
Issue Tracking Report Details (Continued)

History Listing

Click on the **History Listing** link to view a history of the issue history.



status	add dt	days	hrs	min.	was assigned to	now assigned to	add user
RESPONSE	01/24/14 01:28:02 PM				SANDYTURNER	SANDYTURNER	KATHIHARTWELLREMP

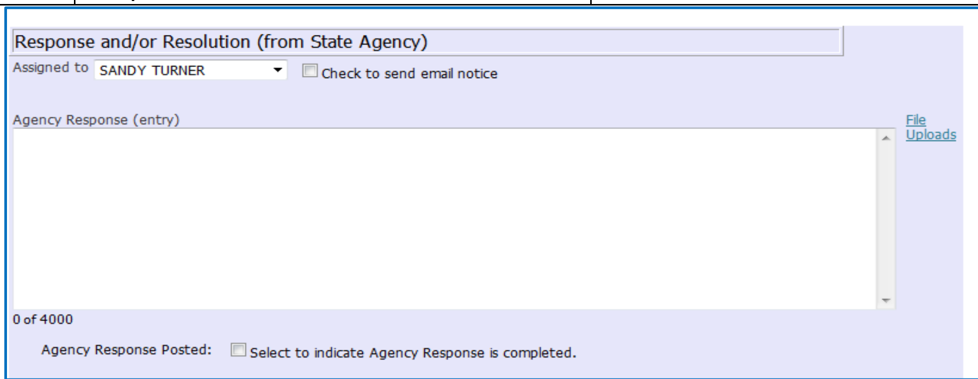
Click on the **Return to Issue Tracking Entry** button to return to the Issue Tracking Entry page.

Continued on next page

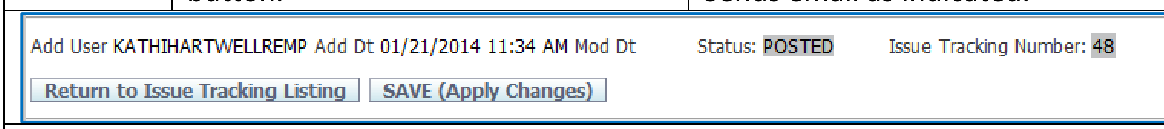
Issue Tracking Report Details (Continued)

Issue Response Follow the steps below to respond to the issue.

Step	Action	Results
1.	Enter the response in the agency response field.	



Step	Action	Results
2.	Upload files as needed.	
3.	Check the **Check to send email notice** checkbox if needed.	
4.	Check the **Agency Response Posted** checkbox if response is complete.	
5.	Select the **SAVE (Apply Changes)** button.	Saves the information. Sends email as indicated.



Step	Action	Results
6.	The response will display on the issue listing.	

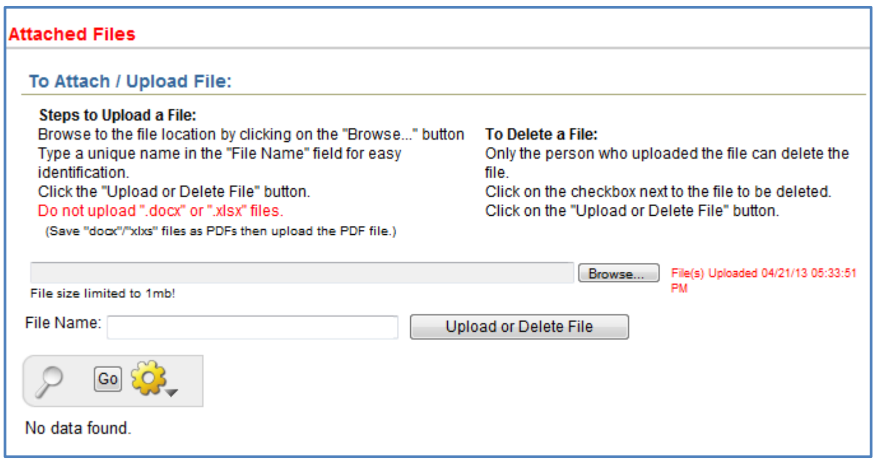
MCO Assigned	MCO Response (display limited to 120 characters)	Assigned To	Response (display limited to 120 characters)	Response Date
-	-	DEBY ZIMMERMAN	-	01/16/2014 03:00 PM
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	-	-	-
-	-	DEBY ZIMMERMAN	-	-
-	-	DEBY ZIMMERMAN	-	-
-	-	SANDY TURNER	Problem has been fixed.	01/21/2014 01:55 PM

Upload File Attachment Utility

Introduction At times, it is necessary for additional information to be attached to the report. All attached files are associated with the Issue Tracking worksheet.

How to Attach a File Follow the steps below to attach a file to a specific report.

Step	Action	Results
1.	The Attached Files Region is on the right side of the page.	



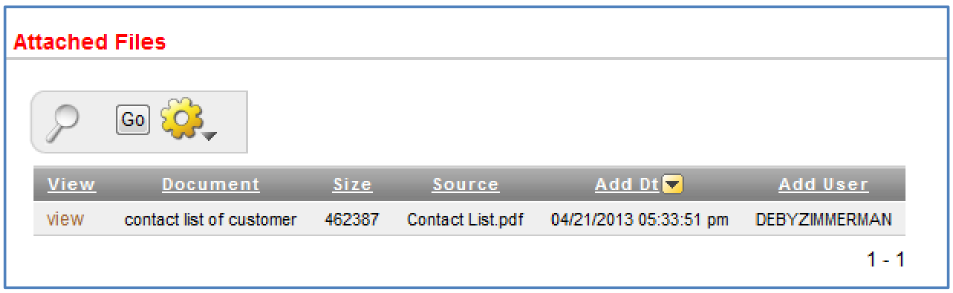
Step	Action	Results
2.	In the Attachments region, click on the **Browse** button	The “Choose File to Upload” dialog box displays.
3.	Browse to the saved document to be attached.	For best results attach only the following type of documents:

Document Type	Action
Word or Excel	Convert documents to Acrobat Reader format (pdf) before attaching
PDF (Acrobat)	Attach with no additional steps needed
Graphics	Attach JPG or GIF type graphics – do not attach TIF files

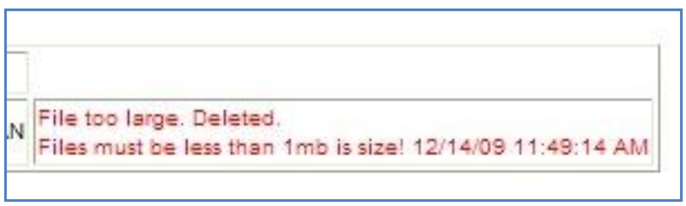
Continued on next page

How to Attach a File continued

Step	Action	Results
4.	On the Choose File to Upload dialog box, click on **Open** button	File is selected and entered into the Upload File field.
5.	Enter a **Name** in the File Name field.	
6.	Click on **Upload or Delete File** button	Completes the upload. Table of the attached files is displayed.



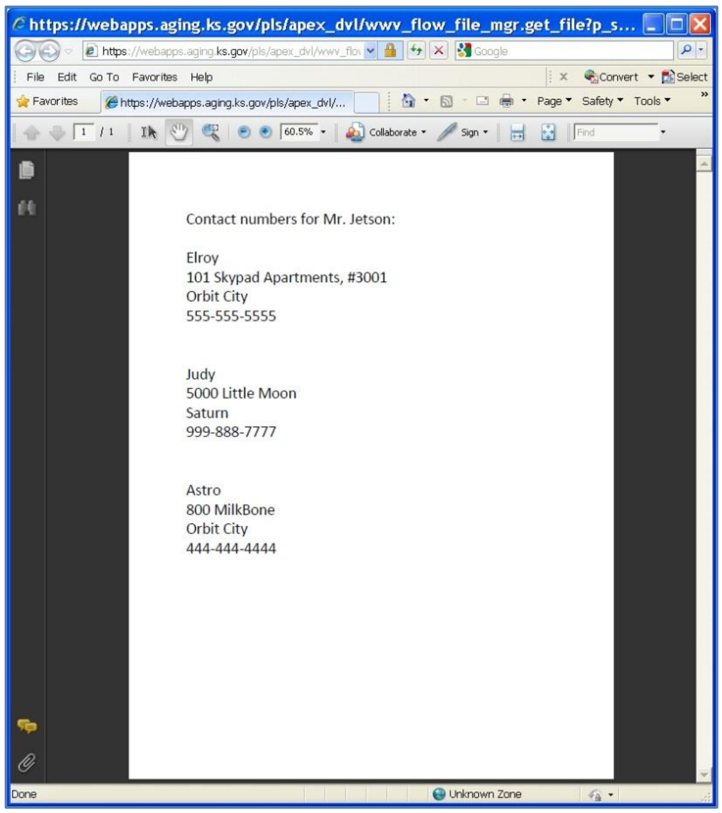
<u>Note</u>: If the file is too large, a warning notice will be displayed that the file was too large and was deleted.



Viewing an Attachment

How to View the File Follow the steps below to view an attached file on a specific report.

Step	Action	Results
1.	Click on the **file name**	"Contact Listing" in the above example
2.	The document will open in a separate window.	

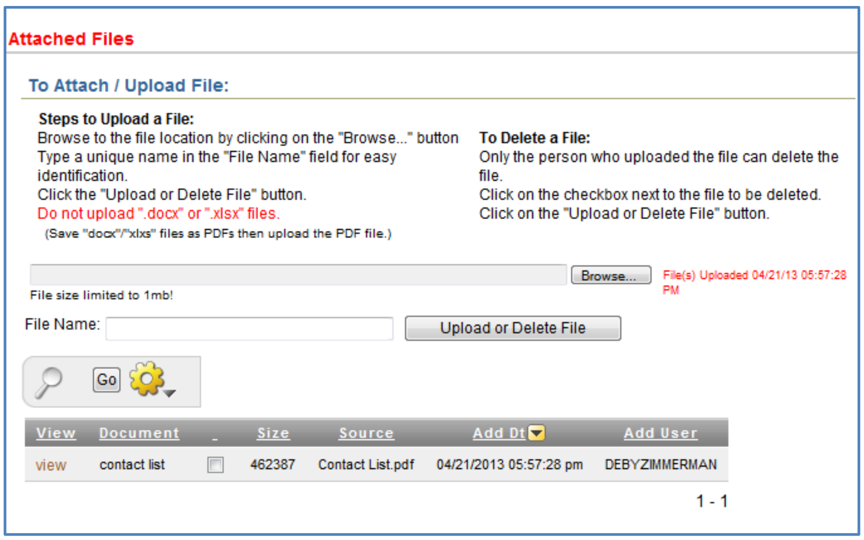


Deleting an Attachment

Introduction The delete option is only available to the user who originally attached the file.

How to Delete a File Follow the steps below to delete an attached file on a specific report.

Step	Action	Results
1.	In the Attachments region, click on the **check box** under the delete column.	



Step	Action	Results
2.	Click the **Upload or Delete File** button.	File is deleted from the system.

Logging-Out

Introduction When the user will not be using the application for a period of time, log off the program for security reasons.

How To Follow the steps in the table below to exit the application.

Step	Action	Result
1.	In the upper right corner of the window, there are three navigational options.	

Link	Action
Logout	The browser will return to the Log-in page
KDADS Home Page	Returns back to the KDADS Home Page for further access options.